

Project Managers' Advisory Group

MINUTES April 16, 2007

Attending:

Alisa Cutler	EPMO
Bob Giannuzzi	EPMO
Jesus Lopez	EPMO
Gaye Mays	EPMO
John McShane	EPMO
Barbara Swartz	ITS
Jim Tulenko	ITS
Carolyn Whitlock	ITS
Vicky Kumar	DOT
Cheryl Ritter	DOT
Annette Murphy	DPI
Lynn Beck	DHHS/DMH
Joe Cimbala	DMH/DD/SAS
Charles Fraley	DHHS/DRM
Caroline Jackson	DHHS – Public Health
Chris Cline	NCCCS
Frank Seiber	DOL
David Prince	DOJ
Randy Moody	DENR
Dell Pinkston	DOA
Lynn McGarrah	Agriculture

Bob Giannuzzi welcomed everyone to the meeting and asked first-time participants to introduce themselves. **Carolyn Whitlock** of ITS introduced herself.

Bob Giannuzzi acknowledged that Bob Andersen of ITS and Jim Skinner of the Department of Insurance had attained their PMI Project Management Professional certification. They will each be presented with a framed letter of congratulation signed by George Bakolia.

Bob called for approval of the March minutes – approved.

Jesus Lopez reported that the PMP Prep class is going well and that instructor reassignments being made since Steve Tedder has left.

NCPMI news was covered next. **John McShane** reported that next month's Public Sector LIG on May 3 will feature past NC Speaker of the House, Joe Mavretic's presentation will be *What Legislators Look for in IT*. The meeting will be videotaped and then placed on the EP MO website. **Vicky Kumar** advised that there is a Requirements Management class being held in Greensboro later this month. A state employee discount for this year's NCPMI Annual Event will be pursued.

Bob asked if anyone are familiar with the BEACON program. Since few attendees knew, he went on to briefly describe the HR/Payroll function that will be rolled out in January and April 2008. **Sharon Hayes** has been temporarily assigned as Program Manager for the ITS deliverables to this effort.

Bob Giannuzzi called for updates from the Task Groups.

- *Workflow* **Jesus Lopez** reported that there were no updates.
- *Status Reporting* **Gaye Mays** spoke about this group's recommendation of a project status reporting indicator to the PPM tool. She also submitted a draft recommendation to limit project initiation phase to 90 days. Handouts of these recommendations were given to attendees and will be attached in the circulation of the minutes. Gaye's team is also looking at a method to report Initiation hours and dollars.
- *PM Tools* **Gaye Mays** reported that the SAP demo will be scheduled some time in May.
- *Methodology* **Alisa Cutler** discussed a proposed Lessons Learned template that was circulated to the attendees. It too will be attached when the minutes are sent. **Alisa** would like feedback within seven business days. **David Prince** expressed concern that if LL updates become gate requirements, the business community might view this as just another hurdle. The Methodology group is also looking at revisions to the Closeout process.

Bob passed out the following information on upcoming teleconferences of interest to the PM Advisory Group.

Organization/website	Contacts	Upcoming Calls
NASCIO http://www.nascio.org/committees/projectmanagement/	Stephan Jamison 859/514-9148 sjamison@AMRms.com Access 888/272-7337 conference ID 6916986	<u>May 8</u> (3:00) Overcoming Project Barriers: Ten Keys to Success
PMO Executive Council http://www.pmo.executiveboard.com/	Register at website	<u>April 18</u> (12:00) Embedding Continuous Improvement in Project Management Processes
CIO Executive Council http://www.cio.executiveboard.com/	Register at website	<u>May 8</u> (4:00) Realizing the Potential of IT Employees
Application Executive Council http://www.aec.executiveboard.com/	Register at website	<u>May 17</u> (8:00) SOA Testing and Performance Management
Infrastructure Executive Council http://www.iec.executiveboard.com/	Register at website	<u>May 8</u> (11:00) Server Consolidation and Virtualization
Information Risk	Register at	<u>April 17</u> (11:00)

Executive Council http://www.irec.executiveboard.com/	website	Business Workflow Risk Assessments <u>May 15</u> (11:00) Pragmatic Approaches to Roles-based Access Implementation
Enterprise Architecture Executive Council http://www.eaec.executiveboard.com/	Register at website	<u>April 24</u> (12:00) Managing the IT Portfolio for Business Value

John McShane advised that the RFP/Requirements classes may be offered again. **Cheryl Ritter** reported that DOT is very interested in sending more participants. **John** asked for feedback on what training agencies would like to see offered. He also reported that Patti Bowers will work with him in holding periodic procurement focus group roundtables (lunch 'n learn?). **John** solicited a list of desired topics. Some of the Requirements class attendees have expressed interest in Business Analyst training/certification. **Charles Fraley** pointed out that Learning Tree has BA training offerings and that the local IIBA chapter has information on training and BA certification.

Jim Tulenko reported that the PPM tool has been migrated to MS Server 2005. Significant performance improvement has been observed. He has asked for feedback from the team on performance as well as the changes made in some of the fields. He also reported that his team has issues with the next release that was scheduled for deployment this month. Testing activity has been deemphasized. New user training is scheduled for 4/24 – almost full. Jim also reminded the group that cost needs to be reported at Level 4 due to OSC accounting requirements.

Bob distributed a summary of Lessons Learned (attached) of projects completed since the last meeting. He also informed the group that the Lessons Learned file on the EPMO webpage has been updated.

Bob closed with a request for proposals on future agenda items.

Meeting adjourned at 4:15 PM.

Lessons Learned Documentation

Exhibit A

North Carolina Immunization Registry (NCIR) Database Server Upgrade

1. **LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?

Federal funds had a time limit for the expenditure. Working closely together with ITS technical staff, ITS Budget Office, and DIRM Budget Office helped accomplish this in a short timeframe in order to utilize the federal funds.

2. **LESSONS LEARNED** - What opportunities for improvements (project weaknesses) were learned with this project?

Identify requirements sooner to avoid having to expedite orders.

Exhibit B

North Carolina Immunization Registry (NCIR) Enhancements

1. **LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?

Conducting monthly review and sign off meetings worked well and helped us manage to the deliverable schedule stated in the contract.

Exhibit C

CPS Wrapper Implementation

Lessons Learned:

1. Even though you obtain sign-off from customers that they have completed acceptance testing without issue, you need to make sure (as much as possible) that they have tested with data representative of their production data. (e.g. One agency never tested with an ORDER_ID longer than 15 characters long. If they had, they would have exposed the issue we experienced with data truncation)
2. Load testing needs to be conducted continuously over a period of DAYS, not just hours.
3. Review any and all database conversion routines and make time to practice—even the most insignificant routine.
4. Review any DB permission questions before implementation. If you don't and questions arise on implementation day, you may waste precious time answering them.
5. Don't assume that the simplest component of your application will give you no trouble at all.
6. Assign one team member the duty of POC/"Press Secretary" for managing all expectations with management and customers. When the issues arise and the phones begin to ring, it will be easier to have one person handle the calls while the rest of the team focuses on the issue(s).
7. Be realistic with your own expectations. Just because you think you have covered all your bases doesn't mean that some bases might not suddenly appear from nowhere.
8. If you are using encryption in the database, make sure you know the details of how it works (e.g. How many encryption keys? Where are they located?)
9. Even though you have practiced all the procedures such as database conversion and you know how long it will take (i.e. for x number of records, we will need x amount of time), allow twice the amount of time you experienced in practice.
10. Plan to have your primary software vendor on-site for several days following a major implementation. You should plan for at least long enough to see the system through 3 complete cycles (e.g. While we saw several credit card settlements occur successfully, the ACH settlement occurred at 8pm on Monday night following the vendor's departure. We could have probably averted the double-posting issue if we had had more hands to deal with the Monday night ACH issue on Tuesday morning.)
11. Take the time to know your input data intimately and the process for which it will be used. Knowing what has been input into a process in a detailed way, will help you understand what is expected as output from that process (e.g. drop a file in with 20 transactions, thus the database has 20 open transactions to settle, and auto settlement should output a file with 20 batched transactions.)

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

Project was planned to begin 1/1/06, as federal funds were available for the 2006 calendar year. The amount of time required to process the paperwork for the amendment and IMOA were underestimated, resulting in a delay in project start. In the future, allow more time for the process.

Begin development of the IMOA and Amendment sooner.

Understand the process and sequence of events for IMOA, Contract Amendment, and Project Approval
